3C’s – Viewing and Manually Updating Comments, Checklists and Communications

- The 3Cs — communications, checklists and comments — are a flexible way to track and analyze correspondence, lists of requirements, and notes about the students, staff, constituents, and organizations in your database.

- Communication management enables you to fully manage all types of contacts inside and outside your institution. Checklist management enables you to create lists of requirements and monitor their status. Comments creation enables you to attach notable remarks about individuals and organizations.

- You can enter communications, checklists, and comments manually throughout your system, or, using the 3C engine, you can define events and triggers to have the system add communications, add comments, and add or update checklists for individuals or organizations automatically from within your business processes. You can also use the Population Selection process to select a specific population for the 3C engine to assign items to. This guide will focus on manually viewing and updating the 3Cs.

- Each of the 3Cs requires an administrative function and a 3C update/inquiry group. The administrative function identifies the variable data associated with the specific category of communication, checklist, or comment. For Financial Aid, the administrative functions are FINA and FINT.

- Buttons appear on many pages in the system to enable you to transfer directly from that page to another page within the same administrative function, to generate or review a communication, checklist, or comment for the individual or organization whose information you are currently viewing.
This guide will cover:

- Viewing and creating comments
- Viewing, updating and creating checklists and checklist items
- Viewing a communication

Comments - Transfers you to the appropriate Comments page, where you can enter or review comments about the student.

Step One
Viewing Comments – Person Comment Summary Page

Navigate to the following breadcrumb:
Step Two
Viewing Comments – Search Page – Person Comment Summary

On the Person Comment Summary Page enter the Student ID and click on Search
Step Three
Viewing Comments – Person Comment Summary Page

Clicking on the Search Button on this page will display all of the Comments you have security access to view.

If you enter FINA in the Function field on this page, enter the Variable Data (for FINA Function this is Aid Year) and then click on Search, only the Financial Aid Comments for the aid year that was entered in Variable Data will display.
Step Four

Viewing Comments – Person Comment Summary Page

Clicking on the Search Button displays the Comments for which you have access to view.

Clicking on the View hyperlink will bring the Comment up on your screen.
Step Five
Viewing Comments – Person Comment Detail

Viewable from this page:
- The Date and time the Comment was made
- Who made the Comment
- The Comment itself
Step Six
Viewing Comments – View Financial Aid Status Page

You can also View Comments on the View Financial Aid Status Page.

- Navigation to the View Financial Aid Status Page:
Step Seven
Viewing Comments – View Financial Aid Status Page

On the View Financial Aid Status Search page:

Enter:
- ID – (Student ID)
- Academic Institution – UCINN
- Aid Year - 20XX (where XX is the last two digits of the ending aid year)
- Click on Search
Step Eight
Viewing Comments – View Financial Aid Status Page

### Financial Aid Status

<table>
<thead>
<tr>
<th>Field</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aid Year</td>
<td>Federal Aid Year 2015 - 2016</td>
</tr>
<tr>
<td>Institution</td>
<td>UCINN</td>
</tr>
<tr>
<td>National ID</td>
<td></td>
</tr>
<tr>
<td>Campus ID</td>
<td></td>
</tr>
<tr>
<td>Birthdate</td>
<td>03/08/1996</td>
</tr>
<tr>
<td>Dependency</td>
<td>Dependent w/Primary EFC</td>
</tr>
<tr>
<td>EFC Status</td>
<td>Unofficial</td>
</tr>
<tr>
<td>App Date</td>
<td>01/15/2015</td>
</tr>
<tr>
<td>CPS Date</td>
<td>02/13/2015</td>
</tr>
<tr>
<td>Inst Date</td>
<td>11/20/2016</td>
</tr>
<tr>
<td>Correction Status</td>
<td>Pending</td>
</tr>
<tr>
<td>Correction Status Date</td>
<td></td>
</tr>
</tbody>
</table>

### Packaging Status Summary

- **Aid Application Status**: Active
- **Package Status**: Completed
- **SAP**: Undetermined
- **Review Status**: Incomplete
- **INST Verification Status**: Non Select
- **Verification Flag**: Not Read
- **Verification Status**: Not Select
- **Disbursement Hold**: None

### Checklists

<table>
<thead>
<tr>
<th>Item Code</th>
<th>Description</th>
<th>Status Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>FCGIF</td>
<td>Citizenship Documentation</td>
<td>01/13/2016</td>
<td>Received</td>
</tr>
</tbody>
</table>

### Communications

<table>
<thead>
<tr>
<th>Method</th>
<th>Date Completed</th>
<th>Direction</th>
<th>Letter Code</th>
<th>Letter Description</th>
<th>Context</th>
<th>Context Description</th>
<th>Unsatisfactory Outcome</th>
<th>Outcome Reason</th>
</tr>
</thead>
</table>

### Comments

<table>
<thead>
<tr>
<th>Category</th>
<th>Comment Date</th>
<th>Comment</th>
<th>Entered By</th>
</tr>
</thead>
<tbody>
<tr>
<td>V/VERIF</td>
<td>01/12/2016</td>
<td>Student was selected for Verification by DOE. All documents are in but there is a discrepancy on the untaxed income field. Adjusted ISIR and marked it as &quot;Send&quot; for it to be picked up in the next ISIR outbound process. Notified student.</td>
<td>Service Account Conversion</td>
</tr>
</tbody>
</table>

### Loan Counseling Status

<table>
<thead>
<tr>
<th>Aid Year</th>
<th>Loan Code</th>
<th>Description</th>
<th>Typing</th>
<th>Requirement</th>
<th>Status</th>
<th>Date Completed</th>
</tr>
</thead>
</table>
Step Nine
Adding a Comment – View Financial Aid Status Page

There are several ways to add a comment in Catalyst. The foremost way is to click on the Comment Bubble located at the top of many of the pages in catalyst. In this example we are on the View Financial Aid Status Page.

Click on the Comment ICON to add a Comment
Step Ten
Adding a Comment – Person Comment Entry Page

Clicking on the Comment icon opens up the Comment Entry Page

On the Person Comment Entry Page:
- Enter “FINA” in the Administrative Function box
- Look up a Comment Category that fits your Comment
- Click on the Variable Data button and enter in the Aid Year
- In the Comment box, type in the Comment
- Your name and ID will appear in the Comment ID located in the Comment Data box
**Step Eleven**

Adding a Comment – Person Comment Entry Page

Enter a Comment in the Comments box.

Click on Save.
**Step Twelve**

Adding a Comment – Person Comment Entry Page – Viewing Comment on View Financial Aid Status Page

After adding and saving the comment, it is now viewable for others to view.

From the Comment Summary Page by clicking on “View.”
Step Thirteen
Viewing a Checklist – Person Checklist Summary

Navigate to the following breadcrumb:

Similar to Comments, Checklists can be viewed in several places. Two of the pages we will review are Person Checklist Summary and View Financial Aid Status Page

Step Fourteen
Viewing a Checklist – Person Checklist Summary
**Step Fifteen**  
**Viewing a Checklist – Person Checklist Summary**

On the Person Checklist Summary page, delete Responsible ID if one is present.

Click on the Search button.

All checklists (for which you have security) will be viewable.
Step Sixteen
Viewing a Checklist – Person Checklist Summary

Clicking on Search displays all of the Checklists to View or Update

Click on “View” to see the Person Checklist Detail Page

Step Seventeen
Viewing a Checklist – Person Checklist Detail Page
The Checklist Detail 1 tab displays the Checklist and its status.

Checklists will have at least one checklist item but in some cases more than one Checklist Item will be associated with a checklist.

Checklist Detail 2 tab displays the Checklist Item and their Statuses.
Step Eighteen
Viewing a Checklist – View Financial Aid Status Page

You can also view Checklists on the View Financial Aid Status Page

- All Aid Year specific Checklist Items will be displayed on this page

Navigate to the following breadcrumb:

Clicking on the Checklist Item Hyperlinks will take you to the Checklist Management – Person Page – Checklist Management 2 Tab
Step Nineteen
Viewing and adding a Checklist Item – Checklist Management 2 Tab

On this page you can view the Checklist Items that are associated with the Checklist.

You can add another Checklist Item to the Checklist by Clicking on the “+” located next to the Checklist Item in the Checklist Item Table box.
Step Twenty
Adding a Checklist Item – Checklist Management 2 Tab

After clicking on the “+” sign a Sequence row is added and all necessary information will need to be inserted.

Using the magnifying glass will present all of the options that are available to you for that data element.
Step Twenty One
Adding a Checklist Item – Checklist Management 2 Tab

Adding a Checklist Item to a pre-existing Checklist Item:
1. Click on the “+” sign
2. Enter the Checklist Item Code
3. Click on the Correct Status code
4. Enter a Due Date
5. Click on Save
Update Checklist Items to either Completed or Waived and clicking on Save will update the Checklist to Completed on Checklist Management 1 Tab.
Step Twenty Three
Updating a Checklist Item – Checklist Management 2 Tab

In this example two Checklist Items were associated with the Checklist.

Each Checklist Item was updated to either Completed or Waived and then Saved.

The Checklist on Tab 1 is now updated to Completed.

The updated Checklist Items are now viewable on the View Financial Aid Status page with their updated Statuses.
Step Twenty-Four
Adding a Checklist – View Financial Aid Status page

Clicking on the Checklist ICON will take you to the Checklist Management 1 Tab
Step Twenty-Five
Adding a Checklist – Checklist Management 1 Tab

- Enter FINA for Function
- Click on the Variable Data button and enter in Aid Year
- Enter the Checklist Code
- Click on Save
- Checklist Management 2 tab is now populated with at least one Initiated Checklist Item
- The Checklist Items on tab 2 (because they are FINA/aid year specific) are now viewable on the View Financial Aid Status Page
**Step Twenty-Six**

Viewing a Communication – Communication Summary

Navigate to the following breadcrumb:

![Navigating to Communication Summary](image)

**Step Twenty-Seven**

Viewing a Communication – Communication Summary

- Enter the student ID on the Search Page and Click on Search
- The Communication Summary page, tab 1 will now be viewable
- Click on Search on the Communication Summary page
**Step Twenty-Eight**

**Viewing a Communication – Communication Summary**

- All of the communications assigned to a student will be visible (for which you have security to view)
- If you had entered specific types of Communications on the Communication Summary Search page, only those types of Communications will be viewable
- Communications with a Function Code of FINA will also be viewable on the View Financial Aid Status Page, under the Communication Section in the middle of the page
- For those Communications with a date in the Date Completed column, click on the View hyperlink associated with the Communication you want to View
- Clicking on the View hyperlink will take you to the Communication Detail 1 tab
Step Twenty-Nine
Viewing a Communication – Communication Detail 1 Tab

- Click on the View Generated Communication hyperlink
- You will now be directed to the View Communication page
Step Thirty
Viewing a Communication – View Communication

- Click on the View Button
- Will open a new browser tab labeled RTF Template
Step Thirty-One
Viewing a Communication – Communication/RTF Template

- After viewing the communication, remember to close the browser tab.
- Clicking on the tab to the left of the RTF Template tab will place you back in Catalyst – Communication Detail.

You have now completed the steps for viewing, updating and creating 3Cs in Catalyst.